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Report Highlights:

The Czech Republic became a European Union (EU) member on May 1, 2004. Accession had a positive impact on reform, and new EU directives and regulations continue to shape the business environment. The standard of living in the Czech Republic is slowly reaching the level of surrounding western economies. The economy grew by 4.8% in 2005 and similar growth is expected in 2006. In terms of consumer preference and spending for food products, consumers demand variety and price still remains a key factor for many customers. However, quality is becoming increasingly important, and demand for U.S. organic and high quality beans, lentils, rice, nuts, fruit, fish and seafood will increase with a growing trend toward healthier eating.

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I. MARKET OVERVIEW

The Czech Republic became a European Union (EU) member on May 1, 2004. Most barriers to trade in industrial goods with the EU fell in the course of the accession process. The process of accession had a positive impact on reform in the Czech Republic, and new EU directives and regulations continue to shape the business environment. Free trade in services and agricultural goods, as well as stronger regulation and rising labor costs, will mean tougher competition for Czech producers. Future levels of EU structural funding and agricultural supports were key issues in the accession negotiations. Even before accession, policy set in Brussels had a strong influence on Czech domestic and foreign policy, particularly in the area of trade.

The standard of living in the Czech Republic is slowly reaching the level of surrounding western economies. The economy grew by 4.8% in 2005 and should see similar growth in 2006. The government has committed itself to reducing the deficit to 3% of GDP by 2008 to meet the Maastricht requirements for adoption of the euro, and has taken some steps to reduce expenditures and raise revenues.

By joining the EU on May 1, 2004, the basic level of value added tax (VAT) changed from 22% to 19%. For most food items (except for some seafood, alcoholic beverages and tobacco) the lower 5% VAT is applied.

In terms of consumer preference and spending, the EU accession does not represent any kind of breakpoint but instead reflects a continuation of a process started many years earlier. Consumers demand variety, and although price still plays a key role for many customers, quality is becoming increasingly important. Demand for U.S. organic and high quality beans, lentils, rice, nuts, fruit, fish and seafood will increase with a growing trend toward healthier eating.

Tariff rates changed on May 1, 2004, and the Czech Republic now applies the EU external common external tariff for third countries. Some U.S. products face higher tariffs (e.g. tobacco, dried fruits, nuts, and fish) while other products enjoy lower tariffs (e.g. whiskey, cigars, and wood products).

The Czech Republic is a net importer of agricultural products (live animals, food, drinks, and tobacco). Total imports of agricultural products in 2005 was \$4.9 billion, out of which \$65 million was from the U.S. (the structure of imports is shown in the table in Section IV.) Total exports in 2005 were \$4.5 billion, out of which \$93 million went to the U.S. (mainly wood and beverages). Over 90% of trade is within the enlarged EU 25 countries.

Key demographic developments and their impact on consumer buying habits

The number of single and childless households is on the rise. Primarily due to young people waiting longer before they have a family and more women entering the professional job market. The result is a higher demand for convenience products, frozen foods, and more frequent eating out. Recently, fresh, chilled, and ready-made meals have become popular. Additionally, with the boom in hypermarkets and larger home refrigerators, once-a-week food shopping is quickly replacing daily purchases of fresh food items.

Food expenditures and food consumption trends

Czech expenditures on food have been declining with the strengthened economy – while Czechs spent over 30% of their disposable income on food in 1989, in 2004 it was 21.3% on food and non-alcoholic beverages and 2.9% on alcoholic beverages and tobacco.

The table shows different eating habits in 1996, 2002 and 2004 (more recent data is not available):

Item	Consumption in kg per capita in 1996	Consumption in kg per capita in 2002	Consumption in kg per capita in 2004	% Index (2004 compared with 2002)
Meat total	85.3	79.1	80.5	101.76
Out of which: Pork	49.2	40.5	41.1	101.48
Beef	18.2	10.9	10.3	94.49
Veal	0.3	0.2	0.1	50.00
Poultry	13.6	23.9	25.3	105.86
Fish total	5.2	5.2	5.5	105.76
Vegetable edible fats and oils	15.8	16.0	16.0	100.00
Milk and milk products	199.2	220.6	230.0	104.26
Eggs (pieces)	276	298	247	82.88
Cereals (in flour)	113.8	101.51	110.2	108.56
Sugar	39.5	40.0	42.6	106.50
Potatoes	77.2	76.0	73.0	96.05
Pulses	2.0	2.1	2.1	100.00
Vegetables	79.5	84.0	79.8	95.00
Fruit	73.5	69.4	83.8	120.75
Spirits (40%)	8.0	8.2 (2001)	7.6	92.68
Beer	157.3	156.9 (2001)	160.5	102.29
Wine	15.8	16.2 (2001)	16.5	101.85
Non-alcoholic beverages	127.0	220 (2001)	275.0	125.00

Product Specific Markets

Alcoholic beverages

Alcoholic beverages market is relatively stable. In 2005, volume sales declined by 1% to 1.9 billion liters, while in terms of value there was an increase by 4% to 134 billion CZK. This shows a trend towards more expansive brands, which is a result of higher purchasing power and higher standard of living.

Beer consumption is the highest in the world with 160 liters per capita consumption. The majority of beer consumed is of Czech origin. Imported beer comes from Germany, Austria, Slovakia, Poland, Hungary, Belgium, Netherlands, Ireland, Mexico and other countries.

Wine drinking has become fashionable and people switch from beer and spirits to wine, as it's more "in" and considered healthier. In 2005, wine consumption rose by 4% and reached 176 million liters. Czech wines improved in quality; however, about 50% of total wine consumption is covered by imported wine. Among European wines the biggest suppliers are Italy, Spain, Austria, France, and Hungary. New world wines are becoming increasingly more popular and top suppliers include Chile, Australia, U.S., South Africa, and Argentina. Imports of wine from the U.S. are rising rapidly, in 2003 import from the U.S. was \$0.5 million, in 2004 \$1.6 million and last year over \$2.3 million.

Market size and growth since 2003 (in \$mil.)

	2003	2004	2005
<i>Alcoholic drinks, total</i>	5,816	5,884	6,112
<i>Beer</i>	2,626	2,724	2,795
<i>Cider</i>	-	-	-
<i>Flavored alcoholic beverages</i>	25	28	33
<i>Wine</i>	832	887	942
<i>Spirits</i>	2,334	2,244	2,342

(source: Euromonitor)

Packaged food

There is strong demand for quality, fresh and healthy products as Czech consumers become increasingly health conscious. Most Czech women are working and the demand for prepared meals is also on the rise. Consumers desire products with innovative packaging, extended shelf life, and nutritious content.

Market size and growth since 2003 (in \$mil.)

	2003	2004	2005
<i>Packaged food, total</i>	4,769	4,999	5,182
<i>Confectionery</i>	492	510	516
<i>Bakery products</i>	777	835	858
<i>Ice cream</i>	142	147	153
<i>Dairy products</i>	1,233	1,282	1,333
<i>Sweet and savory snacks</i>	118	122	126
<i>Snack bars</i>	4	4	5
<i>Ready meals</i>	72	80	90
<i>Soup</i>	85	83	81

<i>Pasta</i>	75	74	73
<i>Noodles</i>	26	28	29
<i>Canned/preserved food</i>	250	270	285
<i>Frozen processed food</i>	279	304	330
<i>Dried processed food</i>	242	256	258
<i>Chilled processed food</i>	294	322	351
<i>Oils and fats</i>	538	535	536
<i>Sauces, dressings and condiments</i>	260	264	268
<i>Baby food</i>	48	50	52
<i>Spreads</i>	93	98	103

(source: Euromonitor)

Pet food

The number of dogs and cats is increasing in the Czech Republic. Last year about 40% of households owned a dog and 20% of households own a cat. The pet food/pet care market is growing by 9% annually and reached 5 billion CZK in 2005, out of which 90% represents food for dogs and cats. Czechs are changing their habits and instead of feeding pets with leftovers and grains, they buy manufactured pet food. Two major companies on the market are Master Foods and Nestle Purina. Supermarkets and hypermarkets are a major distribution channel for pet foods.

Market size and growth since 2003 (in \$mil.)

	2003	2004	2005
<i>Pet food and pet care products, total</i>	193	209	228
<i>Dog and cat food</i>	173	188	205
<i>Other pet food</i>	4	4.4	4.7

(source: Euromonitor)

Soft drinks

The soft drink market is becoming saturated with per capita consumption at 222 liters, the same level as European countries like Germany or Austria and representing a 72% increase since 1998. The soft drinks market reached 30 million CZK in 2005 or 2.3 million liters, which represented a 3% increase from 2004.

There is a growing demand for healthier products such as fruit and vegetable juice and bottled water, enriched with vitamins and minerals and free from artificial colors and additives. The fruit and vegetable juice market has been growing by 4% annually. Carbonates market represented by Coca Cola, Pepsi Cola, and Czech Kofola, Walmark, and Fontea, grew by 1% and functional drinks, such as sports drinks, show the fastest growth rate of 7-8%.

Market size and growth since 2003 (in \$mil.)

	2003	2005
<i>Soft drinks, total</i>	1,299	1,365
<i>Carbonates</i>	694	307
<i>Fruit/vegetable juices</i>	285	340
<i>Bottled water</i>	201	549
<i>Functional drinks</i>	41	62
<i>Concentrates</i>	44	61
<i>Ready to drink tea</i>	29	38
<i>Ready to drink coffee</i>	4.7	7

(source: Euromonitor)

Advantages and Challenges for U.S. Suppliers on the Czech Market:

Advantages	Challenges
Improving economic situation and growing purchase power	Higher competitiveness of some EU products due to elimination of tariffs between the EU and CR
High quality of U.S. products and growing trend toward eating what is healthier; an opportunity for U.S. organic products	EU tariff rates are higher than were Czech tariffs on some products (e.g. seafood, dried fruit and nuts)
New investments throughout the country will create new demand in smaller cities and rural areas	Relatively small volumes with high transportation costs
Good infrastructure, most importers speak English	Unawareness of U.S. products and high promotional costs
Changing lifestyle, eating habits – eating out is more and more popular	Low appreciation of high quality of U.S. products (e.g. nuts); price still plays a key role
Boom of large and modern hypermarkets that carry a wide range of products (30-50,000)	Food safety issues (fear of GMO)
Willingness to try new products; innovative products and packaging increase demand	Lower purchase power compare to the EU

II. EXPORTER BUSINESS TIPS**Local business customs**

Food retailers have their own purchasing sections and buy products from either domestic suppliers or Czech importers. However, after the EU accession and free trade within EU 25, retail chains seek suppliers of cheaper and better quality products anywhere in the enlarged EU. So far they buy U.S. products from Czech importers specialized on various commodities. In the future they may seek large European wholesalers carrying U.S. products.

General consumers tastes and preferences

The traditional Czech cuisine is stodgy and high in calories, heavily biased towards meat, saturated fat and carbohydrates. The changing lifestyles of Czech consumers led to increased interest in functional and healthy food. It can be observed that Czech cuisine contains more fresh fruit and vegetables, poultry and fish, healthier alternatives to bakery products such as wholegrain and graham flour products, cereals, vegetable oils, rice and pasta. Czech consumers are increasingly health conscious and lead ever more dynamic lifestyles. These lifestyle developments are, however, mainly a characteristic of the urban population. This change in the eating habits of consumers, along with the boom in international restaurants and bistros and the popularity of cookery programs on television has meant that Czech consumers are increasingly experimenting with food and trying new recipes, with the result that Italian, Indian, Chinese, Thai and Greek cuisine has become increasingly popular.

Food standards and regulations

Please see Food and Agricultural Import Regulations and Standards report EZ6008. It may be found at <http://www.fas.usda.gov/scripts/attacherep/default.asp>

General import and inspection procedures

All products exported to the Czech Republic must comply with EU import regulations. Complete information on EU import rules for food products may be found at:

<http://useu.be/AGRI/usda.htl>

Incoming goods go either to the customs storage or a freight forwarder's facility at the airport (the Czech Republic has only one international airport). Storage is carried out under the supervision of a customs officer who checks the documents and compares them with commodities. Food inspectors do not routinely check packaged foods, however, custom officers may take samples to check for ingredients. Veterinary certificates are bi-lingual and may be found at the State Veterinary Administration webpage:

http://www.svscr.cz/dokumenty/eu/dovoz/dovoz_en.html

III. MARKET SECTOR STRUCTURE AND TRENDS

Retail sector

In 2005, annual turnover for the Czech grocery retail sector amounted to \$14.2 billion with annual growth of 1.5% per year. The sector has reached a high level of concentration with 74% of consumers shopping at one of the top 10 stores and turnover for the top 10 amounting to 55% of total sales. With growing competition and saturation of the Czech grocery retail market, more mergers and acquisitions are expected to take place in the future. Hypermarkets and discounters will continue to lure more consumers and their sales will grow. Supermarket sales will also slightly increase but the expanding discounters will steal a part of their sales. It is expected that supermarkets will develop more in terms of their structure than in terms of number of outlets.

<i>In \$ billion</i>	<i>2000</i>	<i>2003</i>	<i>2005</i>
<i>Grocery retailers</i>	<i>10.4</i>	<i>12.9</i>	<i>14.2</i>
<i>Hypermarkets</i>	<i>2.6</i>	<i>4.2</i>	<i>4.9</i>
<i>Supermarkets</i>	<i>2.1</i>	<i>2.3</i>	<i>2.2</i>
<i>Discounters</i>	<i>1.1</i>	<i>1.4</i>	<i>1.9</i>
<i>Convenience stores</i>	<i>0.3</i>	<i>0.3</i>	<i>0.4</i>
<i>Independent grocers</i>	<i>0.5</i>	<i>0.3</i>	<i>0.3</i>
<i>Food specialists</i>	<i>1.3</i>	<i>1.4</i>	<i>1.4</i>
<i>Other grocery retailers</i>	<i>2.6</i>	<i>3.0</i>	<i>3.2</i>

(source: Euromonitor)

Foodservice market

Consumer foodservice value sales reached an estimated \$5.4 billion in 2004, up by 2% on 2003. The majority of consumer foodservice operators are independent, and in 2004 they accounted for 99% of all units and 97% of all value sales. Chained operators were active in fast food and cafés/bars, with the largest presence being in fast food with 160 chained outlets in 2004. Shopping centers became popular and effective locations for fast food outlets, specialist coffee shops and cafés. Although burger fast food remains the largest fast food subsector, it faces competition from other fast food types, mainly chicken, pizza, Asian and other ethnic fast food. There were 51 chained full service restaurants in the country in 2004 – chains of Svejks Restaurant, Potrefena Husa by Prague breweries, Ambiente net, TGI Fridays and Pizza Hut.

Outlets in 2004:

	<i>Independent</i>	<i>Chained</i>	<i>Total</i>
<i>Full-service restaurants</i>	8,525	51	8,576
<i>Fast food</i>	1,677	160	1,837
<i>100% home delivery/takeaway</i>	-	-	-
<i>Self-service cafeterias</i>	1,284	-	1,284
<i>Street stalls/kiosks</i>	7,527	-	7,527
<i>Consumer foodservice by type and chained/independent</i>	26,228	262	26,489
<i>Cafés/bars</i>	7,215	51	7,266

(source: Euromonitor)

Food processing

As a result of the EU accession, food processing is concentrated. Many small companies that did not comply with EU hygienic standards were closed down before May 1, 2004, especially meat and dairy processors. Those that survived are usually newly renovated and will gain higher market share. With increased consumer purchase power and demand for higher quality products, processors will be forced to use higher quality ingredients, which creates a market for U.S. exporters.

Domestic industry capacity versus availability of supplied products

In the 1990s, multinational companies (Master Foods, Unilever, Danone, Nestle, Phillip Morris, Coca Cola, Pepsi Cola) purchased many local food production facilities and invested in modernization. Usually these companies have plants in different countries focusing on different products (e.g. Master Foods produces snack bars in the Czech Republic and pet food in Hungary) and supply the whole region.

Czech food industry is strong in production of beer, mineral water, meat products, dairy, and confectionary. Sea fish, seafood and many fruit and vegetables have to be imported since geographic location and climatic conditions do not allow domestic production.

Trends in promotional/marketing strategies and tactics

Promotion of food products appeared with the boom of hypermarkets in the second part of the 1990s and became increasingly important with the stronger competitiveness of retail chains. Retailers use several promotional tools: they distribute their two-week promotional leaflets to households, have in-store tasting, and display products in special promotional aisles. TV commercials are also becoming popular; they are usually used by multinational companies (e.g. Danone) or by alcoholic beverages producers (e.g. Jim Beam), who can afford to pay high fees for this type of advertising.

Trends in tourism sales, holiday gift sales, and Internet sales

The Czech Tourism Office registered over 16.5 million overnight stays by foreigners in 2003. Around one quarter of foreigners are Germans, followed by Italians, Austrians, French, Brits, Dutch, Poles, and Americans. The most popular destination is the capital city Prague, which is also a center of many businesses. Retailers usually introduce new or more expansive products in Prague before they bring them to other Czech cities. Large restaurant capacity in Prague is an opportunity for U.S. fish and wine. Internet food sales are marginal.

IV. BEST HIGH-VALUE PRODUCT PROSPECTS

The following high value products are considered to have good market prospects:

Dried fruits and nuts (almonds, raisins, prunes, pistachios, pecans, peanuts)
Fish and seafood (live lobster, scallops, squid, salmon, mussels)
Alcoholic beverages (distilled liquor, wine, alcohol mixtures for cocktails)
Rice (wild rice, rice mixes)
Various mixes and ingredients (e.g. for ice cream, baking ingredients)
Frozen juice concentrate
Tropical fruit (red grapefruit)
Sauces and spreads (salsa, peanut butter)
Meat (horse, non-hormone treated beef)
Organic products
Pet food
Tobacco

Imports to the Czech Republic in 2005:

HTS Number	Item	Czech total import in MT in 2005	U.S. share in % (in volume) in 2005	U.S. share in % (in volume) in 2003	Czech total import in mil. USD in 2005
0303	Fish, frozen, excl. fillets	9,526	12.5	5	13.4
0304	Fish fillets, chilled or frozen	23,905	6.4	4.6	42.4
0802	Nuts	5,784	30.4	37.9	36.0
080620	Grapes, dried	11,631	4.8	8.9	4.6
1005	Corn	16,348	1.8	5	17.5
1006	Rice	47,241	0.3	1.3	23.2
2106	Food preparations, nonspecific.	46,976	3.0	3.8	174.6
2204	Wine	116,974	0.9	0.2	106.0
2208	Spirits and liqueurs	21,817	5.9	7.4	74.7
2309	Pet food	145,379	1.6	1.2	126.0
2401	Tobacco unprocessed	15,785	21.4	16.3	59.7
4407	Wood sawn/chipped/sliced	311,611	0.3	0.2	120.4
4408	Veneer sheets/sheets of plywood	15,889	2.1	4.2	35.8
5201	Cotton not carded or combed	43,665	4.4	1.3	57.7

Note: The U.S. share on total import does not always reflect real numbers as transshipments through Germany and Netherlands are not included.

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TABLE A. KEY TRADE & DEMOGRAPHIC INFORMATION

The following table shows data from 2005:

Agricultural Imports From All Countries (\$Mil)/ U.S. Market Share (%)	3,601 (2) (2004)
Consumer Food Imports From All Countries (\$Mil)/ U.S. Market Share (%)	2,434 (2)(2004)
Edible Fishery Imports From All Countries (\$Mil)/ U.S. Market Share (%)	103 (3) (2004)
Total Population (Millions)/ Annual Growth Rate (%)	10.2/0
Urban Population (Millions)/ Annual Growth Rate (%)	7.5 (0)
Number of Major Metropolitan Areas	1
Size of the Middle Class (Millions)/ Growth Rate (%)	N/A
Per Capita Gross Domestic Product (U.S. Dollars)	\$11,914
Unemployment Rate (%)	7.9%
Per Capita Food Expenditures (U.S. Dollars) – food and beverages	\$960 (2004)
Percent of Female Population Employed	N/A
Exchange Rate (US\$1 = X.X local currency)	23.947 (2005 average)

(Exchange rate: August 2006: \$1 = 22.0 CZK)

TABLE B. CONSUMER FOOD & EDIBLE FISHERY PRODUCT IMPORTS

	Imports from the World			Imports from the U.S.			U.S. %
	2002	2003	2004	2002	2003	2004	2002
CONSUMER-ORIENTED AGRICULTURAL TOTAL	1,400	1,795	2,434	25	31	39	
Snack Foods (Excl. Nuts)	163	224	304	1	1	1	0.12%
Breakfast Cereals & Pancake Mix	11	16	19	1	1	1	0.84%
Red Meats, Fresh/Chilled/Frozen	52	62	170	0	0	1	0%
Red Meats, Prepared/Preserved	18	26	42	1	1	1	1%
Poultry Meat	33	49	90	0	0	0	0%
Dairy Products (Excl. Cheese)	77	95	127	1	1	1	0.40%
Cheese	47	68	108	0	1	1	0%
Eggs & Products	4	7	14	1	1	1	6%
Fresh Fruit	206	242	306	1	1	1	0.02%
Fresh Vegetables	137	163	186	1	1	1	0.00%
Processed Fruit & Vegetables	118	152	185	3	2	2	2%
Fruit & Vegetable Juices	28	36	38	1	1	1	1%
Tree Nuts	22	28	35	7	10	12	33%
Wine & Beer	56	70	105	1	1	2	0.37%
Nursery Products & Cut Flowers	65	83	93	1	1	1	2%
Pet Foods (Dog & Cat Food)	22	30	63	1	1	1	3%
Other Consumer-Oriented Products	341	443	549	12	15	20	4%
FISH & SEAFOOD PRODUCTS	82	90	103	3	2	3	3%
Salmon	4	5	6	1	1	1	7%
Crustaceans	2	3	3	1	1	1	0.64%
Groundfish & Flatfish	26	26	25	2	2	2	9%
Molluscs	2	2	3	0	1	1	0%
Other Fishery Products	47	53	65	1	1	1	0.13%
AGRICULTURAL PRODUCTS TOTAL	2,243	2,761	3,601	57	58	66	3%
AGRICULTURAL, FISH & FORESTRY TOTAL	2,665	3,274	4,218	65	70	74	2%

Source: FAS' Global Agricultural Trade System using data from the United Nations Statistical Office